

June 7, 1978

MEMORANDUM FOR: [REDACTED]
Executive Secretary, DDA SSP

FROM : [REDACTED]
Office of Communications
OC/CMD/AEB

SUBJECT : Senior Secretarial Panel Considerations

1. Following is a list of informal Senior Secretarial Panel items for consideration. The first group of items is keyed to the DDA Senior Secretarial Panel draft memorandum dated 18 May 1978. Additionally, a separate list of items is addressed simply as a review of earlier discussions.

a. Paragraph II, OBJECTIVES, states: "The DDA SSP has been established for the purpose of Career Management, Development, Competitive Evaluation, ranking, promotion, and assignment of Secretarial personnel, in grades GS-08 and above within the Directorate.

It should be noted that in order to properly address Career Management and Development, a more detailed organization may perhaps be in order to ultimately accomplish the task. While the SSP is certainly organized to competitively evaluate the senior secretaries, it may not be fully chartered or capable (at this time) of providing a total function in terms of Career Management and Development.

b. Regards the "DDA Senior Secretarial Competitive Evaluation Criteria": A number of the items listed under the Performance Category have characteristics similar to existing Office of Communications Competitive Evaluation Listing (CEL) Criteria. There are however, a few that do not appear in the SSP listing--they perhaps should be reviewed for SSP application. Examples are:

Specific Knowledge and Skills: to what degree does the individual possess specific technical and related knowledge and skills necessary to perform the assigned job.

Along that same line, the category Experience and Versatility: consider the professional factors that affect a variety of positions to which the individual may be assigned.

Other categories that perhaps should be considered are: Dependability: to what degree can the individual be depended upon to finish simple and complex tasks properly in time allotted? Works Under Pressure: here we are concerned with firmness of purpose and steadiness in stress situations. Creativity: how imaginative and resourceful is the individual. Representation: how effectively does this individual represent the Office and the organization in dealing with others.

The categories listed above are simply mentioned as perhaps additions to, or expansions of, the suggested Secretarial Competitive Evaluation Criteria.

9 c. In terms of ITEM IV, Guidelines for Evaluation: It is strongly suggested that only Official Files be used (not personal interviews) in providing information for the competitive evaluation. Documented data should be available to all Panel members. The process listed in ITEM IV appears most satisfactory for the general guideline. In addition, it is suggested that perhaps a document such as the Office of Communications Career Service Action (CSA) be periodically submitted so that employees may indicate their personal preference for assignment, training, etc. The assignment document would also provide the individual Component, with a review of employee preferences and a mechanism for recommendation to the SSP. It is felt that such a document should be distributed on a routine basis. The document would basically serve the same purpose as the suggested "Career Preference Outline"; it would however, add the component's view.

W d. Regards paragraph V: Promotion Criteria. It is suggested that the concept of PRA be reviewed considering the competitive system. Should promotions be based on assignment availability or should they be considered as a result of competitive evaluation listings and SSP headroom.

2. The following items have been previously identified as points of interest and are simply addressed as topics of discussion within the SSP:

ITEM 1:

*Proposed for 3
in RHP
Group* Should an officer have the option of accepting any one of the top three selections? Should only a single selection be offered to an Officer, and if declined, the next appropriate selection be forwarded for approval?

ITEM 2:

The mechanism for promotion from GS-07 into the Senior Secretarial Panel (GS-08) should be addressed. How will headroom be controlled?

ITEM 3: Must the secretary take a job that is offered? How will refusal be treated for future competitive evaluations? Is selection for promotion within the SSP dictated purely by position (as is presently the case) or should competitive evaluation listings developed by the SSP carry further weight assuming mobility.

ITEM 4: Once the criteria for competitive evaluation is clearly established it should be distributed to the employees and explained in detail.

ITEM 5: Since the SSP representative may not be designated as a panel representative for a particular Sub-Group, it is suggested that some mechanism be addressed to provide employee representatives within a given Sub-Group. That is: Communications secretaries should have a representative in the Office of Communications. Consequently, all other Sub-Groups should have a tie point to the SSP panel representatives rather than simply a direct tie from the SSP employee to the panel. It is believed that this kind of tie may be required to attain appropriate career counseling guidance, for the senior secretary.

3. The above is forwarded as a "first-look" at the problems associated with organizing the SSP. Once these, and other members, suggestions are addressed, it is believed that the panel will be better prepared to assist in preparing final recommendations for implementing a Senior Secretarial Panel that will serve the needs of the employee and the fulfill needs of the service.



STAT

PROBLEMS IDENTIFIED

DIRECTORATES

1. Policy decision restricting assignment of individuals to GS-08 and above secretarial positions to employees with personal grades either at the grade level or no more than one grade level below that of the position to be filled and the requirement that all qualified personnel are considered for each position with panel nominations of the three "best" qualified candidates for the supervisor's selection. DDA and E
- a. A GS-07 will not be competitive for a GS-08 slot if she has to compete against GS-08s. How will she ever be promoted? This is discrimination against a certain grade level (probably all female) and does not conform to the Uniform Promotion Criteria cited in 18 May 1978. E Career
- b. At present the DDO is promoting senior secretaries and clericals (GS-07 and above) regardless of grade of slot. Will this continue? Will the other Directorates be allowed to do this? DDO
- c. What happens if the 3 best qualified candidates are not interested in the vacancy? Do we then go down the list to the next one, etc. to see who is interested? DDA
- d. What about GS-08 vacancies -- will officers go to the Senior Secretary Panel first to make a selection; if so, what happens with GS-07's who may never get a chance for a GS-08 vacancy? DDA
- e. What about secretaries who are at the GS-08 level and are not qualified in shorthand? Will they be penalized in the rankings? DDA
- f. What about secretaries with geographic location and overtime restrictions? Should they be penalized in the rankings? DDA
- g. What if there is a senior -- GS-11 vacancy -- in the Agency, will the senior official "tap" all Career Services to pick the "top" GS-10/11 applicants? DDA

PROBLEMS IDENTIFIED

DIRECTORATE

2. Cross-Directorate Movement.

All

a. Will cross-Directorate movement be possible under the new system or will everyone be locked into their present Directorates?

b. If cross-Directorate movement is not allowed, what happens to the DDO secretary who, because she is immobile, cannot compete for senior slots within the DDO?

DDO

3. Vacancy Notice System.

All

What will happen to the vacancy notice system?

4. When will guidelines be going out to the Directorates? All

5. Will there be any effort made to see that the Directorates follow a uniform pattern? All

6. Will this new career service include/ all positions, including GS-10 and above? All

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DDA SENIOR SECRETARIAL CAREER PREFERENCE OUTLINE

Name:	Current position title:	Grade:
EOD with Agency:	Office:	DOB:
Agency qualified in: Typing : _____ Shorthand: _____		

CAREER PREFERENCES:

1. Are you interested in remaining in the secretarial field?
2. If you prefer being considered for a professional position, indicate what type of professional assignment you are interested in and what efforts you have made towards attaining this goal via internal and external training/education.
3. Are you ^{older} willing to work overtime if you are ^{nominated} selected for a senior secretarial vacancy which requires overtime?
4. Do you have restrictions as to which building you are assigned to in the Metropolitan Washington area? If so, list.
5. Are you interested in a PCS overseas assignment as a secretary? *DDF for the Agency*
6. Summarize what your ~~future~~ career goals are or if you desire no assignment change at this time. *At this time as you are in the field...*

VI. TRAINING

The Directorate encourages internal and external training for its employees to increase their effectiveness and develop potential for greater career development and responsibility, within budgetary and personnel limitations. Training for senior secretaries depends to a significant degree on individual initiative.

Some recommended courses for senior secretaries include:

- . Office Management
- . Effective Writing
- . Refresher shorthand (for those not qualified by Agency standards)
- . CIA Today and Tomorrow
- . DDA Review: Trends & Highlights
- . Fundamentals of Supervision and Management

DDA SENIOR SECRETARIAL COMPETITIVE EVALUATION CRITERIA

	Outstanding	Strong	Proficient	Marginal	Unsatisfactory
	10	8-9	5-7	1-4	0
I. <u>PERFORMANCE</u>					
A. <u>Quality</u> - the degree to which the individual produces high-quality work.					
B. <u>Production</u> - the degree to which an individual effectively organizes and completes work on a timely basis.					
C. <u>Judgment</u> - the degree to which an individual makes sound recommendations and effective decisions.					
D. <u>Initiative</u> - the degree to which the individual actively seeks additional tasks, assumes responsibility and/or offers solutions to problems.					
E. <u>Interpersonal relations</u> - the degree to which the individual successfully relates to and works with subordinates, peers, and supervisors.					
F. <u>Responsibility</u> - the degree to which an individual willingly accepts responsibility.					
G. <u>Leadership</u> - the degree to which an individual influences, inspires or motivates others in the successful achievement of tasks or activities.					
H. <u>Self-expression</u> (Written and oral) - the effectiveness of the individual in expressing herself orally and in writing.					

DDA SENIOR SECRETARIAL COMPETITIVE EVALUATION CRITERIA
(cont'd)

	Outstanding	Strong	Proficient	Marginal	Unsatisfactory
	10	8-9	5-7	1-4	0
PERFORMANCE (con't)					
I. <u>Adaptability</u> - the degree to which employee responds positively to dynamic requirements and unusual work situations.					
J. <u>Personal characteristics</u> - the degree to which an employee's attitudes, self-discipline, and willingness affects performance.					
* K. <u>Dependability</u> - the degree to which the employee can be depended upon to finish simple and complex tasks properly.					
* L. <u>Works Under Pressure</u> - the degree to which the employee is able to work well under pressure.					
* M. <u>Specific Knowledge and Skills</u> - the degree to which the employee possesses technical skills and knowledge necessary to perform the assigned job.					
Total for performance					
Weight: _____					

*suggested new items

DDA SENIOR SECRETARIAL COMPETITIVE EVALUATION CRITERIA
(cont'd)

(cont'd)

	Outstanding	Strong	Proficient	Marginal	Unsatisfactory
	10	8-9	5-7	1-4	0
II. <u>POTENTIAL</u>					
A. <u>Mobility</u> - the availability and willingness to accept a reassignment within the Directorate/Agency.					
B. <u>Evidence of self-improvement</u> - the degree to which the individual has shown interest in her intellectual and professional growth through education/training and experience.					
C. <u>Supervisory</u> - the degree to which the individual shows potential to motivate and supervise people in an activity or program.					
Total for performance _____ Weight: _____					
Grand total _____					

DDA SENIOR SECRETARIAL PANEL (SSP)

I. POLICY

In compliance with the DDCI memorandum of 13 April 1978, Subject: Establishment of Career Service Panels for the Career Management of Secretarial and Clerical Personnel, the Directorate of Administration has established, effective 15 May 1978, a Senior Secretarial Panel (SSP) to administer a career management program for senior secretaries, GS-08 and above. (Secretarial personnel for purposes of this panel will include all clerical personnel, who function primarily as secretaries, regardless of their occupational title and irrespective of Agency certified shorthand ability.) Such personnel will be identified by each DDA sub-group.

The DDA SSP will have five (5) Voting Members and will be composed of the following:

Chairman - DDA Career Management Officer (Voting Member)

Voting Members - Four GS-12 through GS-14 officers appointed by their respective DDA Office Director. Panel members will serve for two (2) years and membership will be rotated among all nine (9) sub-groups to assure equitable representation.

Executive Secretary and Advisor - DDA Clerical Coordinator

II. OBJECTIVES

The DDA SSP has been established for the purpose of career management, development, competitive evaluation, ranking, promotion and assignment of secretarial personnel in grades GS-08 and above within the Directorate.

The DDA SSP will evaluate annually senior secretaries, GS-08 and above. Results of competitive evaluation will be utilized in making recommendations for assignment of secretaries as senior secretarial vacancies occur in the Directorate/Agency. The names of the three ^(?) (3) best qualified candidates will be forwarded to the Office having the vacancy for consideration. ✓

Assignment to GS-08 and above senior secretarial positions will be restricted to secretaries either at the grade level of the position or no more than one grade below that of the position to be filled.

III. RANKING CRITERIA

The DDA SSP will focus their attention on two (2) primary aspects: (1) the secretary's performance to date and potential to perform effectively at or beyond the next grade level; and (2) the secretary's mobility and willingness to accept higher-graded secretarial jobs elsewhere in the Directorate/Agency. ✓

Secretarial personnel will be numerically ranked within their respective grade structure and will be comparatively ranked according to their overall "Value to the Directorate" under five (5) categories:

1. HIGHEST POTENTIAL (HP) - Employees whose experience, qualifications and excellent performance in assignments and training indicate that they have the highest potential for advancement. Career actions should utilize and further develop this potential.

2. MAY DEVELOP HIGH POTENTIAL (MD) - Employees whose qualifications and performance clearly are above average and who give indication that they later may demonstrate high potential for greater responsibility. Career actions (assignment, training, experience on the job) should enhance their skills and develop this potential.

3. VALUABLE CONTRIBUTION (VC) - Employees whose performance is good and who generally are realizing their potential. This category will include some

employees who may be capable of performing at a higher level of responsibility and some who may not. Among those who may not are employees who are making a vital contribution to the functioning of their office (above average or satisfactory performance) and would continue to do so either in their present or a rotational assignment. Career management for employees in this grouping should provide sufficient opportunities for work satisfaction, improvement of skills, and personal growth at current levels of responsibility so that those who may have future potential have an opportunity to demonstrate it.

4. LIMITED POTENTIAL (LP) - Employees whose overall performance is adequate but who have some characteristics affecting knowledge or performance such that their potential is limited.

5. SUBSTANDARD (SS) - Employees whose performance and potential are substandard in comparison with others of the same grade and occupational category.

In addition to the comparative ranking of senior secretaries as to their value to the service, they will be competitively evaluated based on a numerical point value for determining their development potential. The competitive evaluation criteria form to be used is attached.

DDA SENIOR SECRETARIAL COMPETITIVE EVALUATION CRITERIA

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DDA SENIOR SECRETARIAL COMPETITIVE EVALUATION CRITERIA
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<u>PERFORMANCE</u> (con't)					
I. <u>Adaptability</u> - the degree to which employee responds positively to dynamic requirements and unusual work situations.					
J. <u>Personal characteristics</u> - the degree to which an employee's attitudes, self-discipline, and willingness affects performance.					
Total for performance _____ Weight: _____					
II. <u>POTENTIAL</u>					
A. <u>Mobility</u> - the availability and willingness to accept a reassignment within the Directorate/Agency.					
B. <u>Evidence of self-improvement</u> - the degree to which the individual has shown interest in <u>her</u> intellectual and professional growth through education/training and experience.					
C. <u>Supervisory</u> - the degree to which the individual shows potential to motivate and supervise people in an activity or program.					
Total for potential _____ Weight: _____					
Grand Total _____					

IV. GUIDELINES FOR EVALUATION

To assist the Panel members with their evaluation, the following will be available to them:

- (1) Official Personnel File (OPF)
- (2) Office soft file
- info*
if possible (3) Ranking sheet for each secretary
- (4) Descriptors for comparative evaluation process.
- (5) Evaluation books which will contain
 - (a) updated biographic profile
 - (b) two most recent FR's
 - (c) career preference outline

(These three items will be provided initially by each sub-group on respective secretaries.)

- (6) A spread sheet listing all senior secretaries by grade. *current*
Go.

The _____ will interview each senior secretary prior to each annual evaluation exercise to ascertain *(her)* career interests, goals, and mobility for higher graded secretarial vacancies. The officer will ascertain the secretary's willingness to be assigned at various geographic locations and work overtime if required. Based on this interview, a Career Preference Outline on each secretary will be completed to be included in the evaluation books to facilitate the panel's ranking.

Coincidental with the establishment of the SSP, the following procedure will be implemented with regard to reassignment of DDA secretaries to GS-08 positions:

V. PROMOTION CRITERIA

Upon completion of its findings, the SSP will prepare a summary report on its numerical and comparative rankings and submit it to the _____.

Included in this report will be a short paragraph on each secretary based on the ranking. After review by the _____, this information will be available to each senior secretary to discuss with _____.

DDA SENIOR SECRETARIAL CAREER PREFERENCE OUTLINE

Name:

Grade:

Office:

Title:

EOD:

DOB:

Agency qualified in:

Typing:

Shorthand:

SUMMARY STATEMENT (To include secretary's interests and mobility for reassignment including any restrictions with regard to geographic location or overtime; this summary should also include the secretary's future career interests, i.e., remaining in the secretarial field or becoming a professional employee. If the employee is interested in becoming a professional employee, what efforts have been made via internal and external training/education towards this goal).

(signature)

Page 1 mid

Does Selection mean promotion? — [maybe]

- - for a specific assignment, the "best three" could conceivably include a candidate midway i.e. at the 50th percentile of either a value ranking or a promotional ranking list which would not (by fact of assignment to a higher position) affect the promotion list.

- o Such an assignment could, depending on performance affect subsequent rankings in that performance at a higher level would be new input on the employee concerned.

Page 2
TOP

Will Panel Serve as Counselors?

- - Memo states DDA is waiting for direction from OP.

- o To me this seems to be their decision, there is precedence for almost any combination in the Agency.

Page 2
mid

Vacancy Notice?

- Assumption is made that only unhappy or incompetent employees utilize vacancy notices

- o might a good seg be looking

for more headroom or more challenge?

Page 2
mid

Vacancy Notice? cont

- oo If unable to fill position w/ qualified candidate from within Career Sec. Vacancy Notice can be used.

Page 2
bottom

Lateral Movement?

- apparently DDA would go to vacancy notice for GS-09 position before developing their own GS-08's

Page 3 bottom

What if not interested?

- - Rather than threatening the say vis-a-vis ranking, why not just continue down the list of candidates in the career sec
- oo concern is voiced about only getting unhappy or incompetent applicants from vacancy notices -- what will be the result of coercion & threats to "best 3"?

Page 4

GS 8 Vacancies

Top

Same issue as GS 9's & lateral movement.

page 4

#4 how about performance + potential, this issue is faced by any professional panel i.e. are the skills there for higher level jobs? if not how about training?

#5 Ranking should be for value & or promotion, sounds like a separate ranking for assignment.

o pick best 3 qualified candidates from among ranking for specific assignments.